



# City of San Diego



**February 1, 2004**

**Quarterly Report (October - December)  
Public Utilities Commission Decision 02-05-046, Rulemaking 01-08-028  
Project Reference Number 284-02**

**I. Program**

Whole House Energy Retrofit Incentive Program.

**II. Program Description**

The *Whole House Energy Retrofit Incentive Program* (the Program) is a local residential program aimed at homeowners who reside in homes constructed before 1978. There are three sub-groups of homeowners within this market that are being targeted by the program: (1) owners who submit plans for an addition or remodel of their home, (2) hard-to-reach homeowners in lower-income areas of the City, and (3) homeowners interested in reducing their energy consumption.

The incentive program is being marketed as a comprehensive package of benefits that includes: (1) the rebates available from San Diego Gas and Electric (SDG&E), (2) information about energy efficiency, (3) design and inspection assistance from the City, and (4) an additional financial incentive offered under this program. The comprehensive incentive offered under the City's program is additive to residential energy efficiency measure incentives available from SDG&E.

The incentive program is a whole-house retrofit plan. Program applicants are currently able to take advantage of three levels of incentives depending on the extent of the retrofit work they select. The third package was introduced through City of San Diego Water Bill mailers beginning April 14, 2003.

- ◆ Package 1. For homeowners who insulate their attic with R-30 insulation, install double-pane windows, install low-flow shower heads and wrap their water heaters (as appropriate) the retrofit incentive will be \$200 to \$600, depending on income level. (See Table 1 for incentive amounts for various income levels)

- ◆ Package 2. For homeowners who do all of the above and also install a new, high-efficient furnace, the retrofit incentive will be \$400 to \$800, depending on income.
- ◆ Package 3. For homeowners who insulate their attic with R-30 insulation, wrap their water heater (as appropriate), install low-e window film on all windows, and replace 50% or 10 (whichever is less) of their incandescent light bulbs with CFL bulbs, the rebate incentive will be \$300 to \$500 depending on income level.

Homeowners are responsible for selection, purchase and installation of the energy efficient materials and equipment required under this program. Information about acceptable energy efficiency levels of materials and equipment is provided in the program information brochures as well as the Program's website.

### III. Program Summary Data

#### 1. Aggregated Customer Information

The customer information is available in the Q4 worksheet of the Customer Information Workbook Q4. This customer Workbook contains the information of customers who applied and/or received rebates during this **quarterly reporting period only**.

#### 2. Applications Received and Not Yet Paid

Total Number of applications received Oct - Dec and Not Yet Paid (Committed)	13
Estimated amount of Rebate Incentives to be paid (Committed rebate and inspection fee dollars)	\$3,800
Estimated demand and energy savings as a applicable (Committed kW, kWh, Therms)	9kW, 3,647kWh, 1,787Therms

#### 3. Average Rebate Processing Turn-Around Time

This program is difficult to measure in terms of "turn around time". Simply defined, "turn around time" would be the time it takes to pay out a rebate from the date of initial application to the date the rebate check was created. In this case, the average rebate processing time is 6 weeks. However, our program allows citizens to apply to the Program before construction on their home is complete. This means they can generate a building permit application and be ready to schedule an inspection at their convenience. This makes the "turn around time" appear to be much longer than it needs to be since people apply to the program and they wait several weeks or even months before scheduling an inspection. The average "turn around time" from date of inspection to the date the rebate check is created and mailed to the customer is about 15 days.

#### 4. Total Applications Received

During this reporting period, there were 16 new applicants and 7 applicants who have completed the installation of the measures and received rebates. This period no direct marketing material was sent out, but we continue to receive inquiries from past mail-outs and many people are responding as the program nears the termination date.

### **IV. Training**

#### Quarter 4 of 2003

The City of San Diego did not conduct any formal training sessions for its staff this quarter. There is continual collaboration between City departments and personnel to ensure the most accurate information is available to the public.

### **V. Marketing**

#### Quarter 4 of 2003

Though there was no large marketing venture this quarter, the mailing of a Department-wide newsletter, the Curbside Recycler, in the previous quarter continued to generate a strong caller response. This newsletter was delivered to over 300,000 City of San Diego residents. Our total customer calls received as a result of the all direct mailings exceeds 1850.

The Whole House Program continued the educational component by providing a free compact fluorescent light bulb and performing an energy conservation presentation at the following location:

- 10/26/03, presentation at St. David Episcopal Church

Future Community Presentations are being scheduled through Community Planning Committees and Police Station Store Fronts.

#### **➤ Green Schools Program**

The City of San Diego has been authorized by the CPUC to commit funds from The Program's Marketing budget for the City's existing Green Schools Program. The City of San Diego has committed \$28,000. The Green Schools Program consists of education high school students through in-class lectures and guided energy audits of school facilities. Off campus, there is one service project per school where the students conduct another energy audit of a non-profit community center and lighting retrofits are installed on the selected building. The Green Schools Program also consists of a Youth Forum and a Perception Survey, studying the knowledge of energy conservation perceived prior to education versus post education.

During Quarter 4, marketing and outreach activities for the Green Schools Program commenced. Thirty teachers from San Diego high schools were contacted, first by e-

mail, then by phone. Twenty-three school administrators were sent a packet of informational materials, including a formal letter, student handout, brochure, and lecture outline. City staff composed an announcement that appeared on the San Diego Science Alliance (SDSA) website, and attended the San Diego Youth Symposium on October 20 and SDSA's Community Event on October 22 to distribute information about Green Schools. Grant funds in the amount of \$239.54 were expended for printing 200 copies of a full-color Green Schools brochure.

The marketing strategy was successful. The goal of eight participating schools has been achieved: Kearny, Mission Bay, Mira Mesa, University City, Rancho Bernardo, The Preuss School, Scripps Ranch, and Torrey Pines. Staff continues to recruit engineers to assist with school energy audits, and research possible sites for community service projects. Staff began to completed development of curriculum materials, including a PowerPoint presentation, student handouts, and a Teacher's Handbook, which contains all the information needed by participating teachers.

Meetings to develop the Public Survey were held, and San Diego State University professors were contacted to begin establishing a partnership of interests.

## **VI. Inspections**

### Quarter 4 2003

There were 6 inspections completed this quarter. All program participants passed inspection on the first round.

## **VII. EM&V**

### Quarter 4 2003

The City's EM&V consultants are working with SDG&E to obtain the necessary participant billing history information to begin their post-ante billing analysis study. This study is expected to be completed within the next quarter. Due to the program extension the final report submitted by the consultant will be due on July 1, 2004. The City has committed the EM&V budget of \$63,500.

### **VIII. Budget Summary**

The budget summary shown in the table below represents the expenses that have been charged to the Program for **Quarter 4, 2003 ONLY**.

	<b>CHARGED EXPENDITURES</b>
Total Administrative Costs	\$85,408.91
Total Marketing/Advertising/Outreach Costs	\$2,961.54
Total Direct Implementation Costs	\$5,355.18
Total EM&V Costs	\$0
Total Other Costs	\$0
<b>Expenditures Grand Total</b>	<b>\$93,725.63</b>

The budget summary shown in the table below represents the expenses that have been charged to the Program **YEAR-TO-DATE**.

<b>CATEGORY</b>	<b>CHARGED EXPENDITURES</b>
Total Administrative Costs	\$233,655.01
Total Marketing/Advertising/Outreach Costs	\$62,231.78
Total Direct Implementation Costs	\$22,707.30
Total EM&V Costs	\$0
Total Other Costs	\$0
<b>Expenditures Grand Total</b>	<b>\$318,594.09</b>

### **VIII. Percentage of Program Goals**

The Program goals were adjusted through the submittal of the Program Extension Request. The percentage of goals achieved shown below reflects the new program goals established through the request.

<b>CATEGORY</b>	<b>% OF PROGRAM GOALS</b>
% of program spending	58%
% of kW goal	31%
% of kWh goal	20%
% of therm goal	28%
% of customer goal	59%